



INDIANA CHARTER SCHOOL BOARD

Formal Site Visit Guidance

*For Charter Schools Authorized by
the Indiana Charter School Board*

January 2013

For more information, please visit the
Indiana Charter School Board website:

<http://www.in.gov/icsb>

Overview

One of the most important ways that the Indiana Charter School Board (“ICSB”) gathers performance information about the schools it authorizes is through site visits. Site visits allow the authorizer to observe the school firsthand, interact with key stakeholders, and corroborate school-reported information. Pre-Opening site visits are conducted at least once prior to the start of the school’s first year. Once a school has opened its doors and is serving students, the ICSB regularly conducts Formal, Monitoring and End-of-Term site visits.

Formal site visits are conducted in the Fall or Winter of each year to gauge the school’s progress toward meeting academic success, financial health, and organizational compliance goals. Formal site visits are conducted by ICSB staff members and/or their authorized designees, who interview key stakeholders, conduct classroom observations, review documentation, and attend a Board meeting. Written feedback is provided to the Board of Directors and school leadership.

During a charter school’s first year serving students, the Formal site visit is held during the Winter. The primary purpose of the Formal site visit in the first year is three-fold: to orient the school’s Board of Directors to the ICSB Accountability System, to observe the school firsthand, and to interact with key stakeholders at the school. A review and assessment of academic outcome data is incorporated into the Formal site visit protocol beginning in the Fall of the school’s second year serving students.

Purpose of Formal Site Visit

The [ICSB Accountability System](#), which is incorporated into the charter agreement, sets forth the goals and measures for the school and is used to evaluate the school’s academic performance, financial health, and organizational compliance. At its core, the Accountability Plan poses three critical questions:

- Is the school’s educational program a success?
- Is the school in good financial health?
- Is the organization in compliance with applicable laws and regulations, and with the charter?

During the Formal Site Visit, the ICSB seeks to address these three questions. Outlined below is the process the ICSB review team utilizes during the Formal Site Visit to gather information as evidence of progress in each category.

Is the school’s educational program a success? The ICSB gathers information on the academic program through a review of academic outcomes as measured by state assessments, interviews with leadership and staff, classroom observations, and inspection of the physical learning environment. A combination of quantitative and qualitative data enables the ICSB to better understand the overall success of the school.

Is the school in good financial health? The ICSB gathers information on the school’s financial health from interviews with leadership, board members and staff, observation of business practices, and examination of the school’s financial reports and annual independent audit as described in the [Financial Reporting Guidelines](#) posted on the ICSB website. Interviews with stakeholders are critical to understanding how well the school is managed financially and the extent of Board knowledge surrounding financial oversight.

Is the organization in compliance with applicable laws and regulations, and with the charter? The ICSB gathers information on the school's organizational effectiveness and leadership through interviews with leadership and staff, observation of school routines and school climate, examination of school documents, and attendance at a school Board meeting. The ICSB may complete a document review on site to monitor compliance. We also analyze the extent to which the Board understands its roles and responsibilities in both oversight of the school's operations and in driving the strategic direction of the school.

Planning for the Formal Site Visit

To help schools plan for the Formal site visit, we ask school leadership and the Board to make necessary arrangements and prepare applicable documents for review. *Appendix A* of this document details the specific information we request of each school. The Formal site visit will be held at the school location and will typically last 6-8 hours. In the school's first year serving students, the site visit will last approximately 3-4 hours.

The ICSB review team will review the following materials prior to the visit:

1. Charter Agreement, including the Application and any Amendments
2. Annual Accountability Plan Progress Report
3. Previous Formal Site Visit Summary Report(s)
4. Annual Financial and Compliance Audit
5. Board Meeting Minutes from the last six Board meetings
6. Master Schedule
7. Correspondence between ICSB and School (if applicable)
8. Intervention materials, if applicable (e.g., Corrective Plan)
9. Any other relevant materials the school's Board and leadership request the ICSB to review

Note that, during the school's Formal site visit in its first year serving students, only Items 1, and 5-9 are applicable.

Site Visit Overview

In preparation for the Formal site visit, we request the following assistance and deliverables from school leadership. See *Appendix A* for additional details on these and other action items.

- Site Visit Schedule. Create a site visit schedule. Schools may refer to the sample site visit schedule in *Appendix B* of this document.
- Send Requested Documentation to ICSB. Email Board Meeting minutes, agenda and materials for upcoming Board Meeting, and Master Schedule to the ICSB review team.
- Allocate Sufficient Time. Allocate time for the leadership team to accompany ICSB staff during classroom observations, participate in meetings, and debrief at the end of the site visit to discuss observations.

Prior to the visit, the ICSB review team will check in with the school leader to learn of any unique scheduling circumstances for the day. For example, the ICSB team should be notified of any testing, new teachers in the building, substitutes, and special programming. Please note that much of the site visit includes meetings with key stakeholders. *Appendix C* of this document contains sample meeting questions to assist in stakeholder preparations.

During the visit, the ICSB team will – either individually or as a full team – complete the following tasks:

- Check in with school leadership to review schedule for the day.
- Meet with the School Leader to discuss the status of the school.
- Meet with representatives of the Education Service Provider (“ESP”), if applicable.
- Observe classrooms, hallway transitions, and out-of-class time (e.g., lunch) with school leadership. See the ICSB’s classroom observation tool in *Appendix D* of this document.
- Meet with 3-4 teachers, potentially during their lunch hour or prep periods.
- Meet with the CFO/COO or their equivalent. If bookkeeping services are handled by a third-party, a representative of the third-party should attend this portion of the site visit.
- Meet with the curriculum and/or testing coordinator. This individual may or may not be the School Leader.
- Meet with 2-3 parents.
- Meet with 3-4 students.
- Meet with the Board Chair.
- Meet with the Chair of the Audit or Finance Committee.
- Attend and observe a Board meeting. Due to scheduling constraints, this may occur on a separate day.
- Debrief with the Board Chair, School Leader and ESP representative (if applicable) to provide some verbal feedback on the day’s observations. Depending upon scheduling constraints, this debrief session may occur via telephone a day or two after the site visit.

The ICSB review team will conduct all stakeholder meetings with a long-term perspective in mind. The purpose of these meetings is to review the progress of the school over the course of the charter term, not just during the current school year. Wherever possible, meetings should be conducted separately. Note that the ICSB team may ask stakeholders to provide evidence to substantiate a statement (e.g., Board minutes).

Additional Board members are welcome to attend parts of the site visit; however, please be aware of Open Door Law requirements with respect to quorum.

Site Visit Feedback

Following the Formal site visit, ICSB staff will provide formal written feedback summarizing our observations. The feedback will identify areas of strength as well as areas that require improvement. This written feedback will be provided to the Board, school leadership and ESP (if applicable) in the form of a narrative and completed Site Visit Summary Form (see *Appendix E* of this document). Pursuant to Paragraph 15.4 of the [Charter Agreement](#), if more serious concerns arise from a site visit, the ICSB may require the school to implement a Corrective Plan. At the request of the school’s Board and school leadership, ICSB staff will schedule follow-up conference calls to discuss the written feedback.

Appendix A: Document Requests and Preparation

To ensure time is well-spent during the Formal site visit, please have the following items completed or prepared before the visit, and available the day of the visit.

PRIOR TO SITE VISIT		
ITEM #	ACTIVITY AND/OR DELIVERABLE	TARGET COMPLETION DATE
1	Create a site visit schedule and schedule meetings with key stakeholders (e.g., Board Chair, School Leader, CFO/COO, Education Service Provider representative, curriculum coordinator, teachers, parents, students, and other key stakeholders).	Initiate scheduling approximately 3 weeks in advance of the site visit. Finalize schedule 1 week prior to site visit.
2	Identify a private meeting space with internet access in which the ICSB review team can conduct meetings, document observations, and conduct other tasks related to the visit. Ensure that the steps for gaining internet access and wireless passwords (if necessary) are provided.	Approximately 2-3 weeks in advance of the site visit.
3	Make teachers and staff aware of the visit and let teachers know that observers may be stopping by the classrooms. (No special accommodations are necessary for classroom visits.)	During scheduling process.
4	Email the following documents to the ICSB staff: (1) Board Meeting minutes from the last 6 Board Meetings; (2) Board Meeting agenda for the upcoming Board Meeting; (3) Master Schedule, including periods/times of instruction, instructor names, and room numbers; and (4) any other documents in the school's possession that the Board and leadership believe are relevant for ICSB staff to review.	1 week prior to site visit.
5	Email the final site visit schedule to ICSB staff. Be sure to indicate on the schedule the time school starts that day. See <i>Appendix B</i> for a sample schedule.	1 week prior to site visit.

AVAILABLE DURING SITE VISIT	
ITEM #	ITEM OR DELIVERABLE
1	Notice of any special events or exceptions to the master schedule (e.g., an all-school assembly, classroom with substitute teachers, events in the community that impact the school day, etc.)
2	Compliance binder(s), containing Items 1-20 outlined in Exhibit B: Monitoring Plan of the Charter Agreement . The binder(s) should contain all required items or indicate where such evidence can be found. ICSB staff will review the binder during the site visit to assess compliance with the terms of the charter agreement.
3	Any additional information the school leadership believes will assist the ICSB review team in assessing the school's overall performance (e.g., strategic plan, interim student assessment results)
4	ICSB staff may refer to or request the following information during the site visit: (1) Annual Accountability Plan Progress Report; (2) Annual Financial and Compliance Audit; and (3) Prior Board Meeting materials.

Appendix B: Sample Formal Site Visit Schedule

ABC School ICSB Site Visit Agenda Friday, February 8, 2013

Main Contact: Joe Smith, Operations Manager 317-222-2222
School Commences: 7:45 a.m.

Time	Location	Agenda Item
8:00 – 8:15 AM	Main Office	Check in with office staff and School Leader, and proceed to designated meeting room
8:15 – 8:45 AM	3 rd Floor Conference Room	Meet with School Leader
8:45 – 9:15 AM	3 rd Floor Conference Room	Meet with Education Service Provider Representative
9:15 – 10:00 AM	2 nd Floor Staff Room	Meet with Parents
10:00 – 10:20 AM	3 rd Floor Conference Room	Curriculum Coordinator: Mr. Adams
10:25 – 11:40 AM	Classroom Observations	Suggestions: English, Mr. Scott, Rm 215 Honors Western Civ, Ms. George, Rm 416 Geometry, Mr. Adams, Rm 303 Life Science, Ms. James, 2 nd floor Theater
11:45 – 12:15	Lunchroom	Meet with Students
12:15– 1:00	3 rd Floor Conference Room or Lunchroom	Break for Lunch
1:00 – 1:45	3 rd Floor Conference Room	Meet with COO and third-party bookkeeping firm Available teacher on prep: Ms. Thomas (Rm 312)
1:50 – 2:45	Classroom Observations	Suggestions: Biology, Ms. Hanson, Rm 320 Civics, Mr. Jacobs Rm 313 Available teachers on prep: Ms. Jeffreys (Rm. 221), Mr. Knerr— (Rm 322)
2:50 – 3:30	3 rd Floor Conference Room	Meet with Board Chair and Chair of Finance Committee
3:30 – 4:30	3 rd Floor Conference Room	Debrief with Board Chair and School Leader
5:00 – 7:00	Rm 313	ABC School's Board of Directors Meeting

Appendix C: Sample Meeting Questions

School Leader

Educational Program

- Over the course of the charter term, how has the **school model or educational program evolved and improved**? What circumstances drove these changes and what is your rationale for any significant changes to your school approach as articulated in your charter?
- What are the greatest **strengths** of your educational program? **Weaknesses**? Are these perceptions in alignment with the perceptions of the Board? Why or why not? What measures do you take to continuously evaluate the effectiveness and equity of your educational program?
- What **changes** would you like to make to the educational program in the near future (e.g., curricular, staffing, organizational)? Why? Do you have specific data supporting such changes and specific research suggesting new strategies?
- With regards to the following outcomes, how are you collecting formative data to ensure your school and charter specific goals will be met? What **preliminary data** have you collected to ensure that the indicators and measures set forth in the [ICSB Accountability Plan](#) are being met in:
 - ISTEP+ and ECA proficiency;
 - IREAD-3 proficiency;
 - Sub-group proficiency;
 - Growth to proficiency, as measured by interim assessments utilized by the school as well as the Growth Model;
 - College and Career Readiness;
 - Attendance; and
 - Graduation?
- What is your assessment of the **school's academic performance and outcomes to date**? Are you pleased with the progress of the school and the quality of the educational program?
- What **curricula/programs** is the school currently using and what materials are available to teachers? How is the school assessing the effectiveness of curriculum?
- Are you satisfied the curriculum is being well-implemented and are there measures in place to **ensure that state standards and graduation requirements are being addressed systematically** in all coursework and compliant with state expectations for grade advancement and/or graduation?
- Describe the school's **behavior management system**. How consistently is it implemented? What teacher development is necessary to implement and maintain a positive school culture? What changes have you made over time to improve the system?
- What does the school do to recruit, hire, and retain **high quality teachers and staff**? Describe your school's teacher retention pattern over the course of the charter. What special circumstances have driven this? What support measures and programs are in place to systematically promote teacher retention?
- What is your calendar/cycle of **professional development throughout a year**? How do you ensure that instructional staff is appropriately trained and continuously improving instructional practices?
- How do you **evaluate teachers and other staff**? How often? What research-based methods are used? What tools do you use to evaluate teachers on an annual basis and to obtain formative data on teacher performance?
- Describe your **Special Education (SPED) program**. Who is your current SPED teacher of record? How is your school meeting the needs of special needs students? What is your process for ensuring that any and all IEP provisions are met by instructors and that you are in compliance with all IDEA mandates?
- (If Applicable): Describe your **English Language Learner** program. How is your school meeting the needs of these students? How have these demands changed over the course of the charter? What ongoing training plan are you utilizing to ensure that your staff remains compliant with changing state standards regarding ELL instruction and testing?
- Describe your school's **enrollment and attendance** patterns over the course of the charter, and the reasons for student attrition as categorized by exit/mobility codes. What special circumstances drove these statistics? What has the school

done to meet enrollment and attendance goals? Does the school have an ongoing retention/recruitment plan designed to maintain sustainability of the program?

- Has the school completed **criminal background checks** of all staff and volunteers with ongoing contact with students at the school? What is the school's policy with respect to the frequency of ongoing background checks for existing staff, beyond the initial check conducted during the hiring phase?

Organizational Effectiveness and Charter Compliance

- What have been your greatest **successes** as a school leader? What are your greatest **challenges**?
- How have school leadership and staff worked to build and maintain a **positive and equitable school culture**? What does this look like in your school? Provide examples.
- What tools do you use to **communicate with stakeholders**—students, families, staff, Board members, authorizer, broader community? What has been most effective? Least effective? How do you know?
- Are Board members, teachers and families aware of and supportive of the **school's mission and charter goals**? How do you know?
- How has **family satisfaction** evolved over time? How do you know? What does the school do to ensure families continue to be satisfied with the school's program?
- How has **family involvement** in the school – in actual operation of the program, or participation in other initiatives – evolved over time? Does the school have a plan to increase family engagement?
- Is the current school **facility** adequate for meeting the school's learning program goals? If not, what plans have been made to improve the facility and/or find adequate space?
- Has the Board worked with the School Leader to create a long-term **strategic plan** for the school? If yes, do you as School Leader regularly refer to the plan when interacting with the Board, and also with your staff?
- Do you believe your Board has a firm understanding of its **roles and responsibilities**? What role does the School Leader play and what role does the Board play?
- How would you characterize your **relationship with the Board**?
- (If Applicable), how would you characterize the **relationship between the Board and the Educational Service Provider (ESP)** with which the school has contracted for education management services? Are roles and responsibilities between the Board, ESP and all school staff clearly articulated and understood by all?
- The **Statement of Assurances** was signed by you and the Board Chair as part of the Accountability Plan Progress Report submission requirements. Please elaborate on the school's compliance as outlined in this document. For example, Open Enrollment requirements, FERPA, etc. Can you verify compliance?

Financial Health

- What is the current status of the **school's financial health**?
- Describe any **financial challenges** the school may be facing. How have any challenges been addressed and rectified?
- Does the Board have a **Finance or Audit committee**? If no, why not? If yes, what role does the school leader play on this committee?
- How are both major and minor **financial decisions** made at the school?
- Describe the school's **budgeting process**. How are enrollment estimates formulated and vetted? How often is the budget revised throughout the year? Why?
- What changes, if any, have been made to ensure the school has a **clean financial audit with no findings**?
- Do you have any **concerns** regarding reporting, internal controls, or compliance issues?
- What is your **whistleblower policy**? If you do not have one, why not?
- Do you believe the **Board has a solid understanding of the school's financial situation** and any challenges it may be facing? What kind of financial information does the Board receive from the school? Who reports this information to the Board?

Chief Financial Officer/ Chief Operating Officer or Equivalent

If applicable, these questions will also be directed to a third-party bookkeeping or accounting firm.

Financial Health

- What is the current status of the **school's financial health**?
- Describe any **financial challenges** the school may be facing. How have any challenges been addressed and rectified?
- Describe the school's **financial management and oversight model**. What systems are in place to ensure that the school's financials are well-managed (i.e., adherence to a balanced budget, maintenance of cash flow, management of financial reserves or fund balance, etc.)?
- Does the Board have a **Finance or Audit committee**? If no, why not? If yes, what role does the CFO/COO play on this committee?
- How are both major and minor **financial decisions** made at the school?
- Describe the school's **budgeting process**. How are enrollment estimates formulated and vetted? How often is the budget revised throughout the year? Why?
- What changes, if any, have been made to ensure the school has a **clean financial audit with no findings**?
- Do you have any **concerns** regarding reporting, internal controls, or compliance issues?
- What is your **whistleblower policy**? If you do not have one, why not?
- Do you believe the **Board has a solid understanding of the school's financial situation** and any challenges it may be facing? What kind of financial information does the Board receive from the school? Who reports this information to the Board?
- How would you characterize your **relationship with the Board**?
- (If Applicable), how would you characterize the **relationship between the Board and the Educational Service Provider (ESP)** with which the school has contracted for education management services? Are roles and responsibilities between the Board, ESP and all school staff clearly articulated and understood by all?

Curriculum and/or Testing Coordinator (may be the School Leader)

Educational Program

- Discuss **academic results over time**. Discuss interpretation of result trends and any factors you believe have impacted the school's academic results over time (e.g., population change, professional development, staffing changes, classroom reconfigurations, curricular decisions, etc.).
- What is your assessment of the school's academic performance and outcomes to date? Are you **pleased with the progress** of the school and the quality of the educational program?
- Discuss the school's **growth data by grade level**. Discuss reasons for particularly high or low growth by grade level, if applicable. Discuss interpretation of growth results and how they relate to intervention initiatives or curricular changes.
- How is the school working to meet the **academic indicators and measures** outlined in the ICSB Accountability Plan? What systems are in place to ensure continuous evaluation of academic outcomes?
- Discuss any **interim assessments** the school uses to measure proficiency or progress over time. How does this help inform staff of student progress and inform your instructional practices and intervention systems?
- What processes do you have in place to **evaluate assessment data** and link them to instructional practices?
- Do you have confidence that the assessments you are using will provide you adequate information related to student learning?
- How are **curricular decisions** made and what steps are taken to implement these decisions?
- To what extent does the school use assessment data in **staff performance assessments and staff development**? How has this evolved over time? Do you have confidence that **staff** use assessment data to modify instructional strategies? How do you know?
- How does the school **vary instructional levels and methods** for students with different needs? Is differentiation a clear, stated priority for all instruction?
- How are the needs of **SPED and ELL** students assessed and addressed?

- How is **educational equity** addressed in the formation of intervention initiatives, curricular programming and classroom performance?
- How does the educational program support **behavioral policies/philosophy**, and vice versa? How does the educational program align with and support the school mission and values?
- (If Applicable), how would you characterize the **relationship between the Board and the Educational Service Provider (ESP)** with which the school has contracted for education management services? Are roles and responsibilities between the Board, ESP and all school staff clearly articulated and understood by all?

Board Chair

Organizational Effectiveness and Charter Compliance

- What do you see as the school's **strengths and weaknesses**? Are these observations in alignment with the perceptions of the School Leader? Why or why not?
- Has the Board completed a **long-term strategic plan** for the school? How does the plan support the mission of the school and the terms of the charter? Is the plan referred to during Board meetings, and used to assess school performance over time?
- If there is no strategic plan, why not? Does the Board plan to create one? How does the **Board assess progress** of the school?
- Are the school's **mission and the goals** set forth in the Charter Agreement being achieved?
- What is the Board's process for **evaluating the school leader**? How is the evaluation used? How frequently is the school leader evaluated? Has the Board established measureable goals for the school leader?
- Have Board members received **board training**? If so, please describe.
- Do you believe your Board has a firm understanding of its **roles and responsibilities**? How do you evaluate this and address concerns if they arise? What role does the school leader play and what role does the Board play?
- How would you characterize your **relationship with the School Leader**?
- (If Applicable), how would you characterize the **relationship between the Board and the Educational Service Provider (ESP)** with which the school has contracted for education management services? Are roles and responsibilities between the Board, ESP and all school staff clearly articulated and understood by all?
- Describe your Board's **governance model**—composition, committee structure, frequency of meetings, etc. How does this support your school's mission and long-term plan? How do you ensure that the Board maintains necessary expertise to do its job?
- Does the Board complete a **self-review** each year? If so, please provide documentation of the most recent review. Does this review assess the extent to which the Board understands and acts upon its roles and responsibilities?
- Do you have a **governance binder** with written policies, board bylaws, school handbooks, etc.? How often are bylaws reviewed and updated?
- Do you have a process in place to **regularly review and update Board written policies, especially after the completion of legislative sessions each year**? Do you believe the Board has been proactive or reactive on policy review? Can you provide some examples of when the Board has reviewed/changed policy?
- What **orientation process** does the Board have in place for new members? What training are members given on how to read your school's monthly financial statements? How long is the period between member election and seating? What is asked of members-to-be during this period? Does the school complete criminal background checks of new Board members prior to their joining the Board, as required by the charter agreement?
- The **Statement of Assurances** was signed by you and the school leader as part of the Accountability Plan Progress Report submission requirements. Please elaborate on the school's compliance as outlined in this document. For example, Open Enrollment requirements, Open Door Law for Board meetings, etc. Can you verify compliance?
- Does the school comply with **criminal background checks** for all staff and volunteers with ongoing interaction with students? How do you know this is happening?

Financial Health

- What is the current status of the **school's financial health**?

- Describe any **financial challenges** the school may be facing. How have any challenges been addressed and rectified?
- Does the Board have a **Finance or Audit committee**? If no, why not? If yes, which Board members sit on this committee? What roles do the School Leader and/or CFO/COO play on this committee?
- How are both major and minor **financial decisions** made at the school?
- Describe the school's **budgeting process**. How are enrollment estimates formulated and vetted? How often is the budget revised throughout the year? Why?
- What changes, if any, have been made to ensure the school has a **clean financial audit with no findings**?
- Do you have any **concerns** regarding reporting, internal controls, or compliance issues?
- What is the school's **whistleblower policy**? If you do not have one, why not?
- Do you believe the **Board has a solid understanding** of the school's financial situation and any challenges it may be facing? What kind of financial information does the Board ask of the school? Who reports this information to the Board?

Academic Performance

- With regards to the following outcomes, how are you collecting formative and summative data to ensure your school and charter specific goals will be met? What **preliminary data** have you collected to ensure that the indicators and measures set forth in the [ICSB Accountability Plan](#) are being met in:
 - ISTEP+ and ECA proficiency;
 - IREAD-3 proficiency;
 - Sub-group proficiency;
 - Growth to proficiency, as measured by interim assessments utilized by the school as well as the Growth Model;
 - College and Career Readiness;
 - Attendance; and
 - Graduation?
- What is the Board's assessment of the school's academic performance and outcomes to date? Are you **pleased with the progress of the school** and the quality of the educational program? Is this a school where you would enroll your own children/ grandchildren/ nieces/ nephews?

Appendix D: Classroom Visit Observation

School: _____
 Subject: _____
 Adult Count (including teacher): _____

Date: _____
 Grade: _____
 Start Time: _____

Teacher: _____
 Student Count: _____
 End Time: _____

Yes – Clear evidence of the indicator at proficient or masterful levels.
 Emerging – There is some evidence of the indicator, but it does not appear purposeful or consistent enough.
 No – No, or insufficient, evidence of the indicator. The indicator is not supported through observation.
 N/A – Not applicable. An opportunity for observation was not provided or not pertinent to classroom activities.

Activity Observed

Indicators	Observed?				Evidence/Comments
Establishing the Lesson/Objectives	Yes	Emerging	No	N/A	
Objective is clearly explained, referred to throughout the lesson, and posted for constant reference.					
The lesson is engaging, evidenced by high student engagement during the lesson. Students can summarize what they're doing and why.					
Classroom Management	Yes	Emerging	No	N/A	
Behavioral expectations are clearly displayed in the classroom. Students behave according to posted expectations, with overall behavior focused on learning. All disruptions are minimal (i.e., less than 10% of instructional time).					
Misbehavior is redirected respectfully and immediately.					
The instructor implements rewards/reinforcement for positive behavior. A 3:1 ratio of positive interactions to negative is ideal. There is evidence of consistent performance expectations across the student population.					
Instructional Strategies	Yes	Emerging	No	N/A	
Explicitly connects lesson to relevant student experiences.					
Connects lesson to previously-learned material and scaffolds forward (i.e., formative checks for scope and sequence in use, with re-teaching if necessary before moving on).					
Multiple instructional strategies are evident and effective (i.e., independent practice, visual cues, graphic organizers).					
Differentiated instruction is clearly evident in all practice, from assignments to independent practice, with the teacher clearly addressing the needs of every student.					
The instructor provides an adequate amount of opportunities for students to respond during the lesson (i.e., 20 opportunities per each 10 minutes on average, including individual assignment items).					
Students simultaneously participate in different activities.					
Indicators	Observed?				Evidence/Comments

Assessments	Yes	Emerging	No	N/A	
Teacher regularly checks for knowledge and comprehension (i.e., 20 opportunities to respond per 10 minutes on average).					
Clear formative assessments are used, in addition to questioning checks for understanding (Do Now assignments, exit slips, etc.).					
Students receive corrective and timely feedback.					
Incorrect student responses result in immediate and targeted clarification.					
Indicators	Observed?				Evidence/Comments
Instructional Time and Rigor	Yes	Emerging	No	N/A	
Teacher questions probe for analysis and elaboration (i.e., at least 50% of questions dedicated to higher cognitive levels, and not simply recall and identification).					
Student questions/responses show higher order thinking, pushing towards comparison, application, and analysis.					
Content and learning objective(s) are grade-level appropriate and overtly standards-driven.					
Teacher takes advantage of teachable moments and opportunities, but not to the exclusion of stated objectives.					
Transition time between activities is minimized and routines are obviously evident (i.e., non-instructional time is limited). There is a clear system of organization and routine.					
Learning activities are fluid and obviously all connected to the daily objective (i.e., instructional time is maximized and focused/related to the daily objective).					

Indicators	Observed?				Evidence
<i>On Task Behavior</i>	Excellent	Acceptable	Wanting	Unacceptable	
Students comply with lesson’s directions, work on intended activities, and engage during direct instruction and group discussions/activities. 90%+ engagement is exemplary.	90-100%	75-90%	50-75%	< 50%	
<i>Additional Comments:</i>					

Appendix E: Formal Site Visit Summary Feedback Form

ICSB Formal Site Visit Summary Feedback Form

[School Name]

[Date]

The following ratings provide feedback to the school on the most recent site visit and are not to be considered the school's formative or summative evaluation. Additional documentation and correspondence throughout the year will be gathered and used as part of the ICSB's ongoing evaluation process.

Is the Educational Program a Success?					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
<i>Mission and Vision</i>	4	3	2	1	
<ul style="list-style-type: none"> • Mission and vision are central to the school's identity and inform all decision making processes. • The school's educational program exemplifies the mission and vision of the school. • Observations suggest that the school is making adequate progress toward its mission-specific goals and the indicators and measures set forth in the ICSB Accountability Plan. • Staff members are passionate about accountability and student achievement. 					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
<i>Curriculum and Instruction</i>	4	3	2	1	

<ul style="list-style-type: none"> • The school provides an appropriate, differentiated range of learning opportunities that will enable students to have individual learning needs met. • The school has an explicitly standards-based curriculum program, aligned to the school's mission, and is in compliance with Indiana's graduation requirements. • Teachers have effective strategies for teaching the student population of the school. • Teachers support students in applying learning strategies across all subjects. • Teachers hold high expectations for all students. • Teachers use time well to support instruction and student time on task is maximized. • Teachers use support staff effectively. • Teachers use technology and other resources effectively. • Teachers are consistent and effective in implementing behavior management strategies. • All teachers (but especially new teachers) are supported through a strong professional development plan. • Professional development is job-embedded and directly linked to changing instructional practice in order to improve student achievement. 					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
<i>Assessment</i>	4	3	2	1	
<ul style="list-style-type: none"> • The school culture is one of reflection and analysis of multiple forms of student data. • All staff routinely uses data to track student progress, support education decisions for individual students, and make key school-wide and individual classroom programming decisions. • Student achievement data are regularly reported to staff, parents, and students. • Formative assessment practices are in clear evidence in all instructional practices. 					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
<i>School Culture</i>	4	3	2	1	

<ul style="list-style-type: none"> Students are effectively encouraged to behave well, relate well to others and to have positive attitudes toward learning. Classrooms and hallways provide an attractive and stimulating environment that fosters high academic and personal expectations. School routines and rules are implemented fairly and consistently and communicated clearly to students, parents, and staff. Educational Equity for all students is a clear motivating factor for development of behavior policies and academic decisions. The school has effective measures for promoting good attendance and eliminating truancy and tardiness. The school works with parents to build positive relationships and to engage them as partners in their children's learning. The school is successful in implementing a variety of strategies specifically designed to promote a sense of connection between students and adults. Students are motivated to learn. Anti-bullying procedures are evident in both policy and practice. 					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
<i>Special Populations</i>	4	3	2	1	
<ul style="list-style-type: none"> The school has an appropriate process for identifying students with special needs (e.g., Child Find process assessment and IEP development). The school is making appropriate accommodations for students with special needs (e.g., provides special programs and services in accordance with IEPs and due process; provides special education training to staff where appropriate, etc.). The school is making appropriate accommodations for students with LEP (e.g., English Language Development levels are accurately and appropriately identified in a timely manner) and systems are in place for maintaining proficient staff attention to English Language Learner standards and best practices in instruction. 					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
<i>Academic Leadership</i>	4	3	2	1	

<ul style="list-style-type: none">• The school leader provides competent stewardship and oversight of the school.• Leadership uses classroom observation and the analysis of learning outcomes to improve teaching and learning.• Leadership evaluates the effectiveness of teaching and support staff, and makes decisions on bonuses, raises, professional development plans, probationary support, continued employment, etc.• The school leader ensures that there is strong accountability for student achievement throughout the school, for individual employees as well as the collective school culture.					
Is the School in Good Financial Health?					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
Financial Management	4	3	2	1	
<ul style="list-style-type: none">• The board-approved budget helps advance the mission of the school.• The board-approved budget is balanced and is based on realistic enrollment counts.• The school has a plan for maintaining a positive cash flow, with clear attention given to any legislative funding shifts and contingencies.• The school is correcting all findings from the previous audit.• If the school has entered into a contract for financial services, there is a clear understanding and agreement regarding respective roles and responsibilities of both parties.• The school currently has no complaints from vendors regarding late payments.					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
Financial Oversight	4	3	2	1	
<ul style="list-style-type: none">• Board has working knowledge of the school’s financial position and routinely reassesses that financial position throughout the year.• Evidence of an active Finance or Audit Committee, or the equivalent, was present.• Observations indicate that Board Meeting materials include financial statements that comply with ICSB Financial Reporting requirements.• Observation reflects that the Board regularly monitors the school’s financial health and has a comprehensive understanding of the school’s financial health.					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
Financial Policies and Procedures	4	3	2	1	

<ul style="list-style-type: none">• The Board has approved a set of financial policies and uses these policies on a routine basis to hold school leadership (including the Education Service Provider, if applicable) accountable.• Evidence the school staff, including any third-party financial services entity, complies with the financial policies approved by the Board.					
Is the Organization in Compliance with Applicable Laws and Regulations, and with the Charter?					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
Legal Compliance	4	3	2	1	
<ul style="list-style-type: none">• The school has Compliance binders (or their equivalent) available that contain all documentation as set forth in <u>Exhibit B: Monitoring Plan</u> of the Charter Agreement.• Observation indicates the Board has working knowledge of and complies with Indiana’s Public Access Laws, including the Open Door Law.• The Board is in compliance with its Conflict of Interest policy and Code of Ethics, as evidenced by documentation submitted with the Accountability Plan Progress Report, Board Meeting minutes, interview responses and Board meeting observations.• Observation indicates the school is in material compliance with student enrollment, admissions, retention, discipline, SPED, ELL and due process rights as set forth in Category III: Organizational Compliance of the ICSB Accountability Plan.• Evidence that any complaints filed by students and families have been addressed in accordance with Indiana law and have adhered with the school’s published grievance process.• (If Applicable) The Board reports that the Education Service Provider (ESP) is in compliance with the terms of the management services agreement. This agreement complies with ICSB requirements as set forth in <u>Exhibit K</u> of the Charter Agreement.					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
School Board Effectiveness	4	3	2	1	
<ul style="list-style-type: none">• Board members are committed to the school, and their actions enhance the credibility of the school. Evidence includes regular attendance at Board meetings.• Board members understand their fiduciary role in ensuring the school is fulfilling the terms of the charter, in determining the direction of the school, and in supporting the school’s progress toward its stated goals.• Board members hold themselves accountable for maintaining the viability, performance, and sustainability of the school.• The Board reviews the school’s academic achievement results and progress and uses this information to make decisions about the school’s direction.• The Board reviews the school’s financial and operational performance and uses this information to make decision about the school’s direction.					

<ul style="list-style-type: none">The Board has established clear performance criteria for the School Leader or (if applicable) Education Service Provider (ESP), and evaluates the performance of the School Leader or ESP based on these criteria at least once per year.					
	Exceeds Standard	Meets Standard	Improvement Necessary	Does Not Meet Standard	*N/A Not Applicable
Organizational Effectiveness	4	3	2	1	
<ul style="list-style-type: none">The school facility is safe and conducive to learning.Observation indicates infrastructure and support services are effective and support a quality learning environment. Examples include: technology, transportation, food services.Observation indicates the school has a strong culture of organization, with clear roles and responsibilities for all members of the school community.The school exhibits a high level of family satisfaction based on student retention data, responses during parent interviews, and other sources of feedback (e.g., volume and type of complaints filed by families).External partnerships have been strategically developed to engender academic improvement (e.g., community partnerships, field trips, etc.). Partnerships are implemented in a quality manner and are maintained from year to year (if and as appropriate).All school stakeholders (e.g., students, families, staff, Board members, the ICSB, Indiana Department of Education) are provided with accurate and timely information about the school. Such information is reported through an effective student information system, as well as through more traditional means of communication (e.g., school newsletters, emails, phone calls).Students and families are given accessible, relevant and regular information about student academic progress.Staff members have a clear understanding of roles and responsibilities, and are routinely assessed on their performance. Staff members report that they regularly receive clear, action-oriented feedback on their performance from the instructional leader and/or School Leader.Evidence that staff receive training or support they need to improve their performance. Evidence that all staff members are formally evaluated according to a set of performance criteria communicated in advance to the staff person. Such evaluations occur at least once per year.Evidence that the school has a well-organized student recruitment, enrollment and retention strategy, which is implemented in a timely and quality manner.					
Areas of Strength					

Areas Recommended for Improvement
Follow Up Requirements and Reporting Deadlines

***Not applicable for this school, or evidence was not gathered to substantiate an opinion**